

# Climate Change! Emerson Climate Technologies Accelerates Learning Using Documented Business Processes.

Lia Mason, Supervisor Global IT Training  
*Emerson Climate Technologies*

Joe Kuntner – Director of Consulting  
*Solbourne*

**Abstract** - Learn how Emerson Climate Technologies leveraged documented business processes to complete their training initiative ahead of schedule.

The presentation will cover how Emerson Climate Technologies is using Oracle's User Productivity Kit (UPK) to prepare for current and future learning needs, including blending UPK with Instructor-Led Training; allowing users to mirror real-life situations; creating learning paths for users based upon responsibilities; certifying users on processes; and moving towards the future – educating new implementation teams.

**Business Challenge** - Tasked with providing educational support for Emerson Climate Technologies global Oracle implementation plan. Various Oracle modules will be deployed in a global environment.

Emerson Climate Technologies needed to create a solid foundation of education content to be prepared to support simultaneous implementations in varying cultures. Understanding that learning is influenced by culture, flexible output options to assist with blended learning scenarios were critical. Multiple language support was also important.

It was essential to assess student knowledge retention of Oracle processes to enable user certification prior to Go Live. Emerson Climate Technologies envisioned using a certification process to allow access to production systems.

Previously, Oracle education was provided by the implementation team with limited documentation. We wanted to utilize a platform that offered strong documentation that can evolve to support Emerson Climate Technologies with current training needs and also assist in future ventures.

The project initially involved education focused primarily for end users. This was due to the immediate need to document processes for an implementation where the project team was already immersed in the execution of the project. It was identified that there were education needs throughout the implementation lifecycle and the plan quickly incorporated not only end user education, but increasing the knowledge of our implementation teams.

**Solution** - We chose to leverage Oracle's User Productivity Kit (UPK) tool and partnered with Solbourne. We utilized their library of documented business processes for Oracle E-Business Suite Applications. This gave us the core library to build content for varying processes and cultures.

Content development progressed rapidly with the utilization of documented business processes. We were able to extract and formally document the knowledge of our own business processes by reviewing Solbourne's content with our subject matter experts and perform analysis to determine where gaps occurred. Where differences were identified, content was then modified to mirror our processes and screens.

Having the ability to use documented business processes ensured that the implementation teams were aware of “Leading Practices” prior to implementation launch. Using documented business processes provided a strong launching point for customization of content to our processes.

We also modified resulting UPK topics for Emerson Climate Technologies to include a template with our logo and Chart of Account structure.

**Initial Development and Blended Learning** - Focus began on financial and procurement processes due to immediate need for education. Using the UPK interface, we kept the core content formatted for Emerson Climate Technologies unchanged and then copied the appropriate topics for the current implementation. Approximately 15% of the topics needed modifications which allowed development time to be drastically reduced.

Emerson Climate Technologies specific information was added and screen shots updated based upon our instance. The content or topics that were identified during earlier gap analysis were developed. Using UPK, Solbourne UPK Developers and their documented business processes we were able to generate the training and reference materials for the training event rapidly.

Our goal was to educate using multiple delivery methods to ensure knowledge transfer. Education was delivered in Instructor-Led format, but was designed to integrate the UPK printed materials and UPK interface. It was important to offer multiple delivery methods to review the processes. This guaranteed the learners had every opportunity to understand, question and clarify the procedures. This was even more essential due to global delivery venues.

The education event used a blended format. The instructor would explain the topic and cover the printed material while students followed along in UPK Try It! mode. Then, the instructor would use the Emerson Climate Technologies training instance to cover the topic again in the “Live” platform. To test the knowledge retention and certify the students, they then performed the process using UPK’s Know It! mode. With Know It! mode, we were able to record knowledge retention which facilitated certification.

After the training event the students reviewed the processes as needed prior to Go Live. This gave them the confidence to then perform their tasks in the production environment. The students also used the UPK content online and printed reference materials after Go Live. The Usage Tracking tool within UPK offered the ability to verify that the developed content was being used which assisted with our certification process.

**Evolution** - Beyond end user education, utilizing a documented business process library rapidly converted into UPK content has become a great learning tool for implementation teams and users, providing insight to processes prior to implementation launch. Users involved with implementation teams familiarize themselves with Oracle Navigation and standard Oracle forms by working through the standard Oracle processes documented in the UPK content. Having the opportunity to review and understand documented business processes has proven to make team members more productive during implementation model reviews and Conference Room Pilots.

Documented business processes have grown to include manufacturing and distribution topics customized to Emerson Climate Technologies processes and screens. This expansion of the library customized to our processes offers the documentation of processes to ensure new implementations have a foundation to build upon.

Users access UPK topics for review of a specific process after certification and Go Live as a reference. Not only is the content available for education purposes, but we plan to use UPK Test Scripts to test proposed configuration changes.

To support the platform chosen and developed, we have a strong focus on UPK and its capabilities. We now have internal UPK support. With UPK Developers in house we are able to respond not only to

implementation education needs, but to keep existing content maintained. We also plan to upgrade to version 3.1 to take advantage of the upgraded functionality.

Certification is required for all users prior to Go Live and any additional users before they are granted access to the production instance. UPK's Usage Tracking tool provides insight into user's progress and provides documentation of knowledge needed for certification. We have created custom reports within UPK Usage Tracking to provide a format that integrates usage reporting spreadsheets.

Having documented business processes that are mapped to responsibilities assists in the creation of learning paths for users. This is accomplished by using UPK's content reporting capabilities. These reports provide output of the complete library related to modules designated for an implementation. Then, cross-references are created between the topics and the responsibilities for the implementation. This process produces the learning paths. Learning paths provide a map for UPK users that identifies topics required for their particular certification. The future plan is to utilize UPK's role-based filtering tool to assist users in displaying the content for their appropriate learning path. These learning paths are utilized to certify users on their Oracle processes.

**Conclusion** - With an arsenal of documented business processes in UPK, Emerson Climate Technologies is poised and well equipped to support future Oracle implementations. Throughout the evolution of this initiative we have been gathering knowledge. The documentation of the tribal knowledge of our processes partnered with Oracle leading practices has provided a solid foundation upon which to build. The expansion of UPK knowledge within Emerson Climate Technologies enables us to support ourselves in upcoming projects. Experiencing the benefits of accelerated learning using documented business processes assists in projecting scope and the cost of education development as we progress with present and future Oracle implementations.